

BOARD AND COMMISSION RECORDS RETENTION SCHEDULE

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BOARD AND COMMISSION RECORDS

SG1501.

APPEAL AND REVIEW RECORDS

Series documents reviews of decisions made by the board or commission or appeals to the board or commission concerning decisions made by state agencies, local governments, or special districts. Records may include but are not limited to narrative history or description of case; minutes and testimony; exhibits; reports and findings of fact; final orders, opinions, conclusions, or decisions; audio recordings; working papers; hearing schedules and lists of participants; and related correspondence and documentation.

Retention *Record copy:*

A. Case Files:

PERMANENT. Transfer to State Archives after 3 years.

B. Working Files:

Retain until case is closed and then destroy.

SG1502.

BOARD AND COMMISSION MEMBER RECORDS

Series documents board and commission activities and serves as a reference source for board and commission members. Records may include but are not limited to correspondence, plans, statements of goals and objectives, minutes, committee reports, budgets, financial statements, reports, and other reference material. Records are often compiled in a notebook for each member.

Retention *Record copy:* Retain by agency for 3 years and then destroy.

SG1503.

BOARD AND COMMISSION MEMBERS PERSONNEL RECORDS

Series documents the appointment or election and subsequent personnel actions of board and commission members. If the office is appointive, records may include appointment letters from the governor or agency director and confirmation by the Senate if required. If the office is elective, election records may be included. Records may also include but are not limited to resumes; applications; personnel actions; interest forms for executive appointments; job descriptions; employee data sheets; and related correspondence and documentation.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

SG1504. BOARD AND COMMISSION MEETING MINUTES

Series documents the official proceedings of the board or commission meetings. Records may include agendas; minutes; meeting notices; items for board action; contested case hearings schedules; committee reports; exhibits; and related correspondence and documentation. Records may also include audio recordings of meetings used to prepare summaries.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

SG1505. BOARD AND COMMISSION FORMATION AND ORGANIZATIONAL RECORDS

Series documents the formation and organization of the board or commission. Records may include but are not limited to by-laws; position and policy statements; mission and goal statements; rules and regulations; work plans; and related documentation.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

SG1506. COMMODITY ASSESSMENT RECORDS

Series documents the assessment of fees to handlers, growers, and processors of agricultural products to fund the production and market research, educational, and promotional activities of the agricultural commodity commission. Records include the amount produced or processed and the commission's assessment per unit of production.

Retention *Record copy:* Retain by agency for 3 years or until administrative need ends and then destroy.

SG1507. COMMODITY PROMOTION RECORDS

Series documents the activities of the agricultural commodity commission to promote the marketing and sale of agricultural commodities. Records may include newsletters; circulars; advertisements; seminar reports; trip records; promotional statistical reports; marketing budgets; special events records; press releases; and related documentation and correspondence.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

SG1508. COMPLAINT AND DISCIPLINARY RECORDS, INDIVIDUAL

Series documents complaints brought against licensed and un-licensed individuals alleging professional practice violations and any resulting disciplinary actions. Types of complaints may include violations of laws, rules, or ethical standards; negligence; practicing outside scope of activities to which licensed; breach of confidentiality; and incompetence. Records may include investigation records; complaint forms; narrative description of complaint; complaint log; complaint disposition; hearings and appeals records; audio tapes; disciplinary actions such as suspension or revocation; and related correspondence and documentation.

Retention *Record copy:* Retain by agency for 5 years after case is closed and then destroy.

SG1509. COMPLAINT AND INVESTIGATION RECORDS, ESTABLISHMENT

Series documents complaints brought against establishments alleging violation of laws and administrative rules that govern operation of the establishment. Records may include but are not limited to correspondence; description of complaint; case files; legal notices and orders; hearing records; audio recordings and transcripts; license and certificate records; exhibits; investigative reports; working notes and files; investigation committee records, minutes, and agendas; and related correspondence and documentation.

Retention *Record copy:* Retain by agency for 10 years after case is closed and then destroy.

SG1510. CROP PRODUCTION AND ACREAGE RECORDS

Series documents the number of acres devoted to production of an agricultural commodity and the amount of production. Records may include but are not limited to crop production register, acreage survey, type of crop, year, total acreage, total production, name and address of grower, and related correspondence and documentation.

Retention *Record copy:* Retain by agency for 3 years or until administrative need ends and then destroy.

SG1511. EDUCATION PROGRAM REVIEW RECORDS

Series documents the review of public and private educational programs, including college and university certification programs, to determine if license requirements, continuing education standards, or teacher certification requirements are being met. Records may include but are not limited to correspondence; reports from the college about its faculty, students, and curriculum; catalogs; self-study evaluations; lists of accredited schools; course listings and descriptions; program descriptions and literature; seminar and workshop agendas; and related correspondence and documentation.

Retention *Record copy:* Retain by agency for 3 years or until administrative need ends and then destroy.

SG1512. EXAMINATION AND ADMINISTRATION RECORDS

Series documents the administration of license examinations. Examinations may be administered locally by the licensing board, by an outside examination service, or by a national board. Records may include but are not limited to correspondence with applicants; master copy of exams; development of exam and exam question records; sample exams with answers; examination booklets; and related correspondence and documentation. Records may also include results of the examination including a roster listing student name, ID number, and examination score. Records may include statistical data and analysis of exam scores and statistics on the administration of the exam in other states. Examination scores may also be found in the individual licensee files in Licensing Records.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

SG1513. INCOMPLETE LICENSE APPLICATION RECORDS

Series documents the application process that was initiated but never completed by the applicant. Series may include incomplete, pending, inactive, or denied status applications. Series includes the records of applicants whose files may lack one or more of the following: application, fee, documents such as certificate of education, and examination scores. Applicants may also lack the necessary education and experience, have low exam scores, or fail to satisfy other qualifications.

Retention *Record copy:* Retain by agency for 3 years or until administrative need ends and then destroy.

SG1514. INSPECTION RECORDS, ESTABLISHMENT

Series documents inspections of establishments to ensure compliance with laws and administrative rules that govern operation of the establishment. Types of establishments may include mortuaries, cemeteries, crematoriums, funeral homes, or barber and beauty shops. Records may include but are not limited to inspection ledgers; case files; advertisements; contracts; corporation history; inspection reports; license and certificate records; equipment checks; and related correspondence and documentation.

Retention *Record copy:* Retain by agency for 2 years after last inspection and then destroy.

SG1515. LICENSEE ROSTERS

Series documents persons who are licensed by the board. Records consist of a list which may include licensee name, address, and phone number; license status (current, lapsed, or inactive); type of license; license number; employer name, address, and phone number; method of licensing; dates of initial licensing, renewal, or expiration; audit number; and related documentation. Roster may be published in the form of a directory.

Retention *Record copy:* **PERMANENT**. Transfer to State Archives after 3 years.

SG1516. LICENSING RECORDS, ESTABLISHMENT

Series documents the application process and licensing history of establishments regulated by state law and administrative rule. Types of establishments may include cemeteries, barber and beauty shops, mortuaries, crematoriums, funeral homes, pharmacies, animal euthanasia sites, dog kennels, drug manufacturers, or drug wholesalers. Records may include but are not limited to license and certificate records; applications; inspection reports; background investigations; staff resumes; reports; lists of licensed establishments; and related correspondence and documentation.

Retention *Record copy:* **PERMANENT**. Transfer to State Archives after 3 years.

SG1517. LICENSING RECORDS, INDIVIDUAL

Series documents the process of licensing individuals who have met the professional standards of the licensing board. The licensing process may include application, evaluation, testing, training, licensing, and certification. Series indicates type of license and may include applications; certificate of education or college transcripts; verification of national or out-of-state licensure; examination scores; cashiering information on fees paid; copies of individual licenses; blank licenses and license audit records; verification of work and supervisory experience; resumes; continuing education records; and background investigative reports. Series may also include renewal notices; copies of licenses or temporary permits; special certification or permit documentation; apprentice and intern licensing records; and related correspondence and documentation. Records are arranged alphabetically by licensee name.

Retention *Record copy:* Retain by agency for 3 years or license has lapsed or becomes inactive and then destroy.

SG1518. LOBBYIST RECORDS

Series is used to document lobbyist and lobbyist employer activities. Records may include but are not limited to expenditure reports; registration statements; termination records; guidelines; correspondence; and related documentation. Series includes active, inactive, and terminated files.

Retention *Record copy:* Retain by agency for 3 years and then destroy.

SG1519. REPORTS AND STUDIES

Series provides a record of findings, assessments, recommendations, research activities, studies, accomplishments, goals, and other activities of the board or commission. These reports or studies are reported to the public; the commission's umbrella or oversight agency; other agencies and organizations; the governor or legislature; or the federal government. Series may include project evaluation reports; public surveys; program or plan summaries; progress or performance reports; biennial, annual, or monthly reports; workload studies; photographs; monitoring reports; needs assessment studies; project outlines and schedules; administrative histories; statistics; working papers and drafts; and related correspondence, and documentation.

Retention *Record copy:*

A. One copy of final report, product, or study:

PERMANENT. Transfer to State Archives after 3 years.

B. Working papers, background documentation, and draft material:
Retain by agency for 3 years after final document produced,
or as required by government or agency, and then destroy.

SG1520. SPECIAL COMPLAINT, MEDIATION OR HUMAN RIGHTS CASE FILE

Series may include supplemental information. Information covered by Idaho Code §9-340C is exempt from disclosure.

Retention *Record copy:* **PERMANENT.** Contact State Archivist.

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